Best Practices for Managing Pro Bono Partnerships

June 6, 2024
On The Agenda

- Introductions
- Meet Taproot
- 5 Principles for Great Pro Bono
- Phases of Project Management Crash Course
- Q&A
Meet Taproot

Taproot empowers mission-driven organizations by mobilizing skilled volunteers to advance resource equity.
5 Principles of Great Pro Bono
1) Act like a paying client

- Assess staff and board readiness
- Prepare for knowledge transfer
- Commit to timely, direct and honest feedback
2) Know and identify your needs

- Determine the size of the project
- Map solutions back to priorities
- What are the dependencies?
3) Get the right resource for the right job

- Vet prospective volunteers
- Think about workplace culture
- Skilled volunteering is not a giveaway, it’s a partnership
4) Be realistic about deadlines

- Even small tasks can take longer than expected.
- Skilled volunteering is rarely a good solution for urgent needs.
5) Learning goes both ways

- Is this need urgent?
- What type of skill set do you need?
- Active communication is key to keeping the timeline on point
Phase 1: Kickoff
Purpose

- Make sure everyone involved in the project is clear about what will happen during the engagement.
- Establish the scope of the project
A Strong Kickoff Meeting Leads To:

- The right work completed at the right time
- Trust and clear communications
- Greater impact on the community
- A stronger nonprofit and volunteer relationship
Scoping Document: In Scope

What will this project accomplish? List project deliverables.
(For example: 6 discovery interviews, 2 brochure design options, an HR handbook, etc.)

Pro bono pro tip: If you find yourself listing more than 5 deliverables on your scoping document, consider breaking your project into two more discreet projects instead! The more targeted and specific the outcomes, the better.
Scoping Document: Out of Scope

What will this project not involve? Describe what won’t be accomplished.

*(For example: Focus groups, logo revision, policy implementation, etc.)*

**Pro bono pro tip:** Avoid ‘scope creep’ by being just as clear and explicit about what this project will accomplish as what it WILL NOT accomplish.
Scoping Document: Logistics

- Setting a project timeline
- Agreeing on specifics that must be present or provided in order for the project to be considered complete
- Setting a regular check in schedule
- Determining communications preferences
Completion Criteria

How will you know when the project is complete?

Example:

“The project is complete when the consultant has delivered the final selected logo set and written instruction and completed a staff training on how to use the logo.”
Phase 2: Discover
Purpose

- Volunteer gets to know the nonprofit and its goals.
- Nonprofit provides appropriate general organizational background materials to volunteer.
- Volunteer conducts any additional research to gather necessary intel for project.
General Background Examples

- Press Kit
- Strategic Plan
- Organizational Chart
- Market Research
- Visual Identity/Logo/Style Guide
- Marketing Plan
- Board Meeting Minutes
- Program Evaluation Dashboard
Types of Discovery

- Trainings on key issue areas
- Review of research or data from prior projects
- Environmental scan
- Stakeholder interviews
- Standard volunteer employee/ onboarding
- Review of printed or published materials
- Exploration of hardware, software, or organizational systems
Analyzing Discovery Results

- Nonprofits should make time to process the initial recommendations and analysis from the pro bono volunteer before they provide feedback
- Look for areas in the background that might be unexplored or not appropriately captured
- Try to give feedback in the form of questions rather than statements
- Ask for clarification for unclear areas
Phase 3: Draft
Purpose

- When the actual creation, development, or writing of the deliverable or end-product will take place
- Constant, direct, and honest feedback is critical to this phase
- Looks different for every type of pro bono project
Draft: Tips to Get You Started

- If you have any major concerns or objections to the deliverable coming out of the discovery phase, make sure to speak up!

- Make sure everyone agrees on how to revise or provide feedback on deliverable(s).

- Remember that the key to the drafting phase lies in providing actionable feedback in a timely manner.
What does good feedback look like?

- Comes in the form of questions rather than solutions
- Addresses things that can be changed, improved, or adapted
- Informed by multiple perspectives not just your own
- Is shared for consideration, but with final action upon by both parties
Phase 4: Deliver
Purpose

- Pro bono provider submits the final deliverable(s)
- If training or implementation was agreed upon in the project scope, that is delivered as well
- The nonprofit reviews their plan on sharing out the information or resource with relevant stakeholders
Delivery and Implementation Checklist:

- Delivered feedback in a timely manner and agreed on the final version of the deliverable
- Scheduled trainings for key staff or board members
- Updated all staff members on expected implementation
- Updated board members on the expected implementation
- Decided if the pro bono provider needs to be involved in implementation
- Reviewed any remaining activities and determined their end dates
- The nonprofit reviews their plan on sharing out the information or resource with relevant stakeholders
Phase 5: Evaluation and Celebrate
Purpose

- Wrap up your project!
- Celebrate and thank your volunteer
- Evaluate the engagement
- Start planning for your next steps
Ways to Celebrate

- Give away swag with your logo on it
- Invite to special events (galas, showcases, etc.)
- Recognize pro bono work at a board or staff meeting
- Shout out the pro bono provider in your newsletter or blog
- Act as a professional reference during their next job search
- Recognize with a ‘Volunteer of the Month’ or ‘Year’ award
- Offer additional ways to get involved (board membership, more pro bono, etc.)
Core Evaluation Criteria

- The project is completed and delivered in a timely manner
- The deliverable is implemented and sustainable
- The nonprofit and pro bono providers expectations are met or exceeded
- All parties involved report high satisfaction with the group’s interactions
- The nonprofit reports that the project made an impact
- How will you know when the project is complete?